



# *Managing Users and Organizations*

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The Manage Access function allows users with administrator rights to add and update information on users and organization for which the administrator has access.

Other user roles are able to update only their own user information using the Manage My Account function. See the Managing My Account chapter of this manual for more information on this function.

## User Roles

1. **Administrator:** This is the main contact for VIIS within the health care organization. The administrator is responsible for the maintenance of all organization specific information, including users, sites, and clinicians. The administrator may run reminder/recall reports, Clinic Assessment Software Application (CASA) extracts, and synchronization reports. The administrator also can access the functions available for the following roles.
2. **Inventory Control:** The inventory control user is responsible for managing the organization's inventory of vaccines. This person may use VIIS to view the organization's inventory, add vaccines, update vaccines, and view transactions. The inventory control user has access to the functions available to typical and reports-only users.
3. **Typical User:** This is the primary user of VIIS. The typical user adds, edits, and finds clients, manages immunizations information, and prints immunization reports for clients.
4. **Data Exchange/HMO User:** Data exchange and HMO users will be able to automatically exchange immunization batch files through VIIS. In additions, this user will be able to view client reports.
5. **Reports-Only:** The reports-only user has access to client query information and may print client-specific reports and new client forms. This user may not edit or update information in the registry.



Required fields have asterisks and display in blue type. For example, when entering information on the Add User screen, the user's first and last name are required: thus they have an asterisk and are shown in blue. Input fields not shown in blue are optional.

## Adding Users

To add a user to VIIS, follow these steps:

1. Access the post-login page clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click Add User under the Manage Access section of the menu panel.

**Add User**

\* User First Name

\* User Last Name

User Middle Initial

\* Username

\* Password

Street Address

Other Address

P.O. Box

City

State  Zip  -

Email

Phone Number    Ext

Note: Full address, email and phone number are required for administrators.

3. Enter the following required information for the user:
  - First name, last name, and middle initial (optional).
  - Username. The username should be a minimum of four characters in length and may include mixed –case letters and number.
  - Password. The password should be a minimum of four characters in length and may include mixed-case letters and numbers.
4. Enter additional information if desired, such as the user mailing and e-mail addresses and telephone number. If the user has an administrator or data exchange role, you will be required to enter his or her street address, city state, Zip, e-mail, and telephone number.
5. Press **Save**.



When choosing user names for the registry, be as specific as possible. This will avoid confusion as users are added over time.



The username and password fields are generally entered with lowercase letters. However, if they are entered in mixed case (upper- and lower case), be user to enter them the same way on the VIIS login screen.



Since there is no password verification on the Add User screen, enter this information carefully. Once the Submit button is pressed, there is no way for an organization administrator to look up the password. If the password was entered incorrectly or the user forgets the password, the organization administrator may go into the Edit User function and reset the password.

- Once a user is successfully saved in the database, “user Added, please proceed to the Modify Access Tab. User does not have access until you do “will appear at the top of the Edit User screen.



If a user has access to more than one application and /or organization, he or she will need to select the appropriate application and organization from the pick lists provided.

## Modifying Access

After adding a user, you will need to complete the Modify Access screen for the user; the user will not have access to VIIS until you complete this step. To give a user access, follow these steps:

- At the Edit User screen, click the Modify Access tab.

Add or remove applications and organizations to which this user has access.

**Username** olsondc  
**User** Denise Olson

Application	Organization Type	Organization	Role	Add Access
<input type="text"/>	All Types <input type="text"/>		<input type="text"/>	<input type="button" value="Add"/>

Current list of organizations and applications. [Select user from this list to update their role or status.](#)

Application	Organization	Role	Status	Select
PORTAL	IR Physicians	Portal Developer Role	Active	<input type="checkbox"/>
SNS	IR Physicians	SNS Developer	Active	<input type="checkbox"/>
VIIS	IR Physicians	IR Developer	Active	<input type="checkbox"/>

- Select the users' role fro the pick list provided.
  - Press  to add the information entered for this user.
- Press  when finished entering access information for this user.

## Adding Multiple Users

Administrators also have the option of adding multiple users at once to an application and organization. To add multiple users with roles other than administrator, follow these steps:

- Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.

2. Click Add Multiple Users under the Manage Access section of the menu panel.
3. At the Add Users screen, enter the last name, first name, username, password, and role for the user.
4. Press **Add**
5. Follow Steps 3 and 4 for each additional user;
6. When finished saving the last user, press **Home** to return to the post login page.

## Finding/Viewing Users

VIIS allows administrators to search for individual users by first and last name, or to create a list of all users by organization and application. To search for users within your organization, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click Edit User under the Manage Access section of the menu panel.

Edit User - Search

Application:
All Apps

Organization Type:
All Types

Organization:
All Orgs

Find

Refresh

Status

Active
☒

Disabled
☐

Terminated
☐

Last Name

First Name

To get a complete list of users, leave both fields blank and click the find button.

Search Results

Last Name	First Name	MI	User Name
.....			

3. At the Edit User — Search screen, check the box under Status that indicates whether the user is Active, Disabled, or Terminated. Then enter the last and first name of the user for whom you are searching, or leave both fields blank to bring up a complete list of users matching the search criteria.
4. Press **Find**
5. All names matching the search criteria will be listed under the Search Results portion of the screen. To display the Edit User



To find a specific user, enter at least one character for either the first or last name. To display a list of all users within the parameters entered, leave both the first and last name fields blank.



If a user has not used VIIS for 60 days or more, VIIS will automatically inactivate that user. To search for a user who has been inactivated, be sure to check the “Disabled” box on the search screen; this will bring up both disabled and inactivated users. You may then change the user’ status to active on the Modify Access tab.

screen for a specific user, click the user's last name.

## Maintaining Users

The Edit User function allows you to change any previously entered information about a user, including the initial password and status. To edit user information, follow these steps:

1. Find the user whose information needs updating by following the steps outlined in the Finding/Viewing Users section of this chapter.
2. At the Edit User screen, update the information found on the screen. To reset a user's password, enter a new password and confirm the new password on this screen. To change a user's status, click the appropriate status to indicate that the user is active, disabled, or terminated

**Edit User** **Modify Access**

User Id 24211

\* User First Name

\* User Last Name

User Middle Initial

\* Username

New Password  Confirm New Password

Status ☒ Active ☐ Disabled ☐ Terminated

Street Address

Other Address

P.O. Box

City

State  Zip  -

Email

Phone Number    Ext

Note: Full address, email and phone number are required for administrators.

3. Press when you are finished updating the user's information.
4. Once a user is successfully saved in the database, "User Updated" will appear at the top of the Edit User screen.
5. To modify the access of the user, click the Modify access tab.

6. To edit current access, check the Select box for the access to be edited. Press
7. Update the user' role and/or status for the selected access and press
8. Once a user' access is updated, "User Access Updated" will appear at the top of the Modify Access screen.

## Viewing Provider Organizations

VIIS allows users with an administrator role to view a list of provider organizations within the database. To view the listing, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click List Organizations under the Manage Access section of the menu panel. The following screen will appear:

List Organizations

Organization Type: 

All Orgs

 Show: ☒ Active ☐ Inactive ☐ Both

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Name ↓	Org Code	City	Contact	Phone
3RHD-ESSEX COUNTY HD	057A	TAPPAHANNOCK	<a href="#">View Details</a>	<a href="#">View Phone</a>
3RHD-GLOUCESTER COUNTY HD	073A	GLOUCESTER	<a href="#">View Details</a>	<a href="#">View Phone</a>
3RHD-KING WILLIAM COUNTY HD	101A	KING WILLIAM	<a href="#">View Details</a>	<a href="#">View Phone</a>
3RHD-KING&QUEENCOHD	097A	KING & QUEEN CT HSE	<a href="#">View Details</a>	<a href="#">View Phone</a>
3RHD-LANCASTER COUNTY HD	103A	LANCASTER	<a href="#">View Details</a>	<a href="#">View Phone</a>

3. The list can be sorted for any column by clicking on the column you wish to sort by. The sort order is indicated by an arrow (pointing either up or down) that shows whether the order is ascending or descending. You may also select a letter from the Index menu to view those organizations beginning with the letter selected.

## Editing Organizations

Users may also edit information for the organizations for which they have administrator access. To edit this information, follow these steps:

1. Access the post-login page by clicking the Manage Access/Account menu option at the top of the VIIS screen.
2. Click Edit Organization under the Manage Access section of the menu panel.
3. The list can be sorted for any column by clicking on the column

you wish to sort by. The sort order is indicated by an arrow (pointing either up or down) that shows whether the order is ascending or descending. You may also select a letter from the Index menu to view those organizations beginning with the letter selected.

4. Select the organization you wish to edit by clicking on the underlined organization name. The organization with an asterisk before the name indicates the parent organization and will only display if the administrator has access to it.
5. Enter the updated organization name, county, address information, contact information, or telephone number. The Org ID, Org Classification, Type, Short Name, and Medicaid ID can only be updated by contacting the VIIS Helpdesk.
6. Press **Save** the message "Organization Updated" will appear at the top of the screen. Any information that is updated is also updated for related sites so that the information remains synchronized.